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Advance PM

TaskCentre®

The Leading Business Process Management (BPM) Solution

Business Requirements

- ⇒ To automate invoicing procedures
- ⇒ To ensure that all data entries are 100% complete
- ⇒ To increase the visibility of Work In Progress (WIP) activities
- ⇒ To automate the creation and distribution of management reports
- ⇒ To monitor and enforce company rules and procedures
- ⇒ To remove needless administration from employee workloads

Solution Deployment

- ⇒ Automate the extraction, formatting and distribution of business critical information to and from Advance PM

Business Benefits Delivered

- ⇒ Substantial improvement in company cash flow
- ⇒ Administration-free enforcement and compliance with rules and procedures
- ⇒ Dynamic delivery of WIP reports by exception and/or scheduled events
- ⇒ Decrease in debtor payment cycles
- ⇒ Higher level of detail now being collected on client records
- ⇒ Improvements in fixed fee management activities
- ⇒ Platform to automate other critical business processes

► Company

McKenzies Group

► Industry

Accountancy

► Geographies

United Kingdom

Case Study: McKenzies Group

AUTOMATING BUSINESS PROCESSES

TaskCentre

Orbis Software (UK)

McKenzies was established in 1977 and has grown to become a forward-thinking, modern firm with an enviable reputation for assisting a wide range of individual, commercial and professional interests, including many local charities and clubs.

In 1996 McKenzies became the first firm of Chartered Accountants located in the Surrey TEC area to gain the prestigious Investors in People award, which is an indicator of its commitment to both staff and clients.

McKenzies and it's initial interest in TaskCentre

Being a leading provider of professional services, Mckenzie's has invested heavily in information technology to ensure that its clients receive the highest level of service. As part of the group's investment, McKenzies selected the powerful practice management solution Advance PM and it was this solution that first brought TaskCentre to their attention. This was highlighted by Greg Mackey, Software Consultant for McKenzies when he said, "At the time, we were evaluating the practice management solution, Advance PM and one of its key modules called Vigilant. It later came to light that this module is actually TaskCentre rebranded and is made available to all companies running Advance PM through an OEM agreement between Orbis Software and Advanced Professional Solutions. This was our first exposure to the product."

Mckenzie's and its use of TaskCentre for fee invoice processing

Historically, very little attention has been paid to the cost of processing

Invoices; primarily because of the importance of this manual employee process and the fact that this function is seen by management as a cash generating activity. Yet this one process alone is the most susceptible to errors, time lags and of course heavy, repetitive workloads that strangle cash flow within a company."

Greg recognised the opportunities that TaskCentre's automation capabilities presented for streamlining this function and this was highlighted when he said, "By mapping out the fee earning process, we could see that TaskCentre would remove a considerable amount of administrative intervention. Our employees would routinely create accounts, conduct typing narration, writing off fees against time spent, approve invoices and print associated documents. All these activities could be streamlined using TaskCentre."

To be more specific, Mckenzie's are using TaskCentre to monitor the different stages of fee generation and to notify key personnel, via e-mail, when their input is required. The benefits of this simplistic automated process were highlighted by Greg, "Just by using TaskCentre to proactively monitor and notify on the key stages of the fee generation process, we have dramatically increased the speed in which fees can be raised. Furthermore, members of staff cite greater insight and awareness of what is happening with a given account as a major benefit."

This is a perfect example of how the use of just a few TaskCentre tools can dramatically improve the way a business operates and performs.

Another interesting and valuable

Case Study: McKenzies Group

AUTOMATING BUSINESS PROCESSES

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business process that McKenzies have automated is that of conditional data validation.

In certain situations, McKenzies are legally required to record very specific information about a given client if they match certain and often complex criteria. This typically goes far beyond the scope of most applications, so McKenzies are using TaskCentre to monitor and notify on data fields that have not been completed.

The benefits of automating McKenzies data validation process were stressed by Greg when he said, "The result of using TaskCentre to automate this heavy, repetitive administrative process has been a higher level of detail being collected concerning client records. All businesses these days understand the importance of having full and accurate information to hand but it is absolutely critical for professional organisations such as ours."

McKenzies have also automated a number of other business processes such as the creation and distribution of work-in-progress reports, the monitoring and notification on bills raised that do not attain or exceed predetermined profit (or recovery) levels, the examination of and notification on agreements in the system that are approaching their expiry date and the delivery of alerts to partners regarding proposed agreements that require chasing. However, aside from all of these examples, one of the other key business processes McKenzies are using TaskCentre to automate is that of final fee processing.

McKenzies historically used valuable employee time to manually create and send invoices but this is no longer the case as, Greg highlighted, "We used TaskCentre's Document Automation capabilities extensively. For example, we now receive monthly reports on what expected payments are to be received and which client invoices will be automatically created. TaskCentre will then automatically generate and send those invoices."

The primary commercial gain this has brought McKenzies is a significant improvement in company cash flow and fixed fee management.

McKenzies and its future plans for the wider use of TaskCentre

McKenzies have a number of future plans for TaskCentre but in the immediate future it will be focusing on using it to automatically handle and route inbound e-mails as Greg highlighted, "We have identified a number of opportunities to reduce the costly, repetitive activity of forwarding common inbound e-mails to the relevant employee. We will then extend this automated process by enabling stakeholders to add keywords to the subject line or body of the e-mail so that they can trigger an automated process."

When Greg was asked to give a final comment on McKenzies experience of TaskCentre to date he said, "TaskCentre has delivered a number of financial benefits to the company and is an excellent 'goto' solution when looking to implement or enforce business rules and procedures."